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2016 Procurement Checklist

Use this document to check off procurement requirements as they apply to your district. Keep this checklist on file for easy reference. Remember, all school districts are required to follow Federal procurement regulations to ensure that food for school meals is competitively purchased.

Task to Complete	Explanation	Documentation	Date Completed	Who
Procurement Preparation				
All districts must have a documented procurement plan and written standards of conduct that meet regulations.	7 CFR 210.21 2 CFR 200.318	District Procurement Policy		
Determine if your district has a more restrictive small purchase threshold than the state.	SFAs must follow the most restrictive threshold.	-		
MT Small Purchase Threshold: \$80,000		District Procurement Policy		
Local Small Purchase Threshold: _____		District Procurement Policy		
Micro-Purchase Requirements (\$0-\$3,500) : Harvest of the Month, price comparison not required, specifications not required.				
Document Micro-Purchase Procedures.	Include plan for purchasing, who you are purchasing from, how often procurements are made.	District Procurement Policy		
Maintain purchasing documentation to verify that all procurements are below \$3,500.	Ensure federal funds are allowable, reasonable and allocable.	Invoices Receipts		
Ensure purchases are reasonable and equitably distributed among all qualified sources.	Requirement of micro-purchase threshold is to distribute purchases equitably.	Procurement Plan Must have justification for if only one vendor is being used (such as rural location).		
Small Purchase Requirements (\$3,500-\$80,000): Must compare prices, SFAs decides who to ask for prices, specifications required.				
Document Small Purchase Procedures.	Include plan for purchasing, who you are purchasing from, how often procurements are made.	District Procurement Policy		
Maintain procurement documentation to verify that all procurements are less than \$80,000.	Ensure federal funds are allowable, reasonable and allocable.	Specifications Solicitation documents Purchase orders Invoices Receipts Contract terms (if applicable)		
At least 2 or more price quotes obtained for each procurement.	Competition is an essential part of the procurement process.	Include date of price quote. May use documented calls, store flyers, e-mails, solicitations, etc. Small Purchase Cost Comparison Worksheet		
Formal Purchase Requirements (\$80,000+): Invitation for Bid (IFB) or Request for Proposal (RFP)				
Document Formal Purchase Procedures.	IFB, RFP	District Procurement Policy		
Maintain procurement documentation.	Specific process must be followed for proper formal procurement.	Competitive Sealed Bid/IFB Process Documentation Competitive Proposal/RFP Process Documentation		